



## Q2 Performance Summary

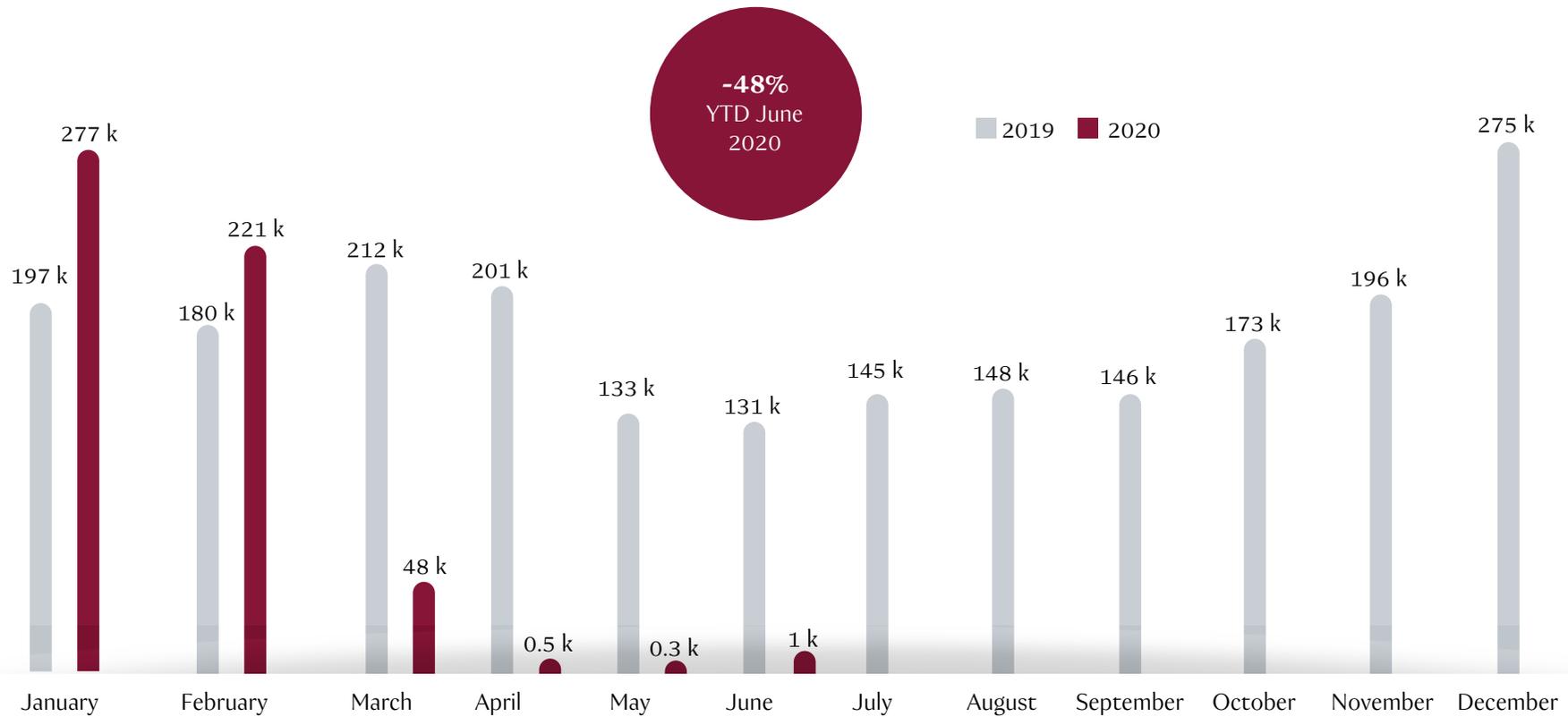
June 2020

## Highlights

- Due to continued border closures in response to the global COVID-19 pandemic, total visitor arrivals are down 48% at the end of Q2 2020, in comparison to Q2 2019.
- With the exception of Italy and Russia (due to significant increases in cruise arrivals prior to March), year-to-date visitor arrivals from Qatar's top 15 nationalities are all down in comparison to 2019.
- Qatar's hospitality sector has, of course, been negatively impacted, but is performing quite well given the circumstances.
- Removing hotel properties that have been leased by the government in response to the pandemic, the average occupancy rate was approximately 45% across all three months of Q2; and stands at 55% year-to-date at the end of Q2.
- Despite occupancy remaining stable, ARR and RevPAR have begun to pick up slightly in June.

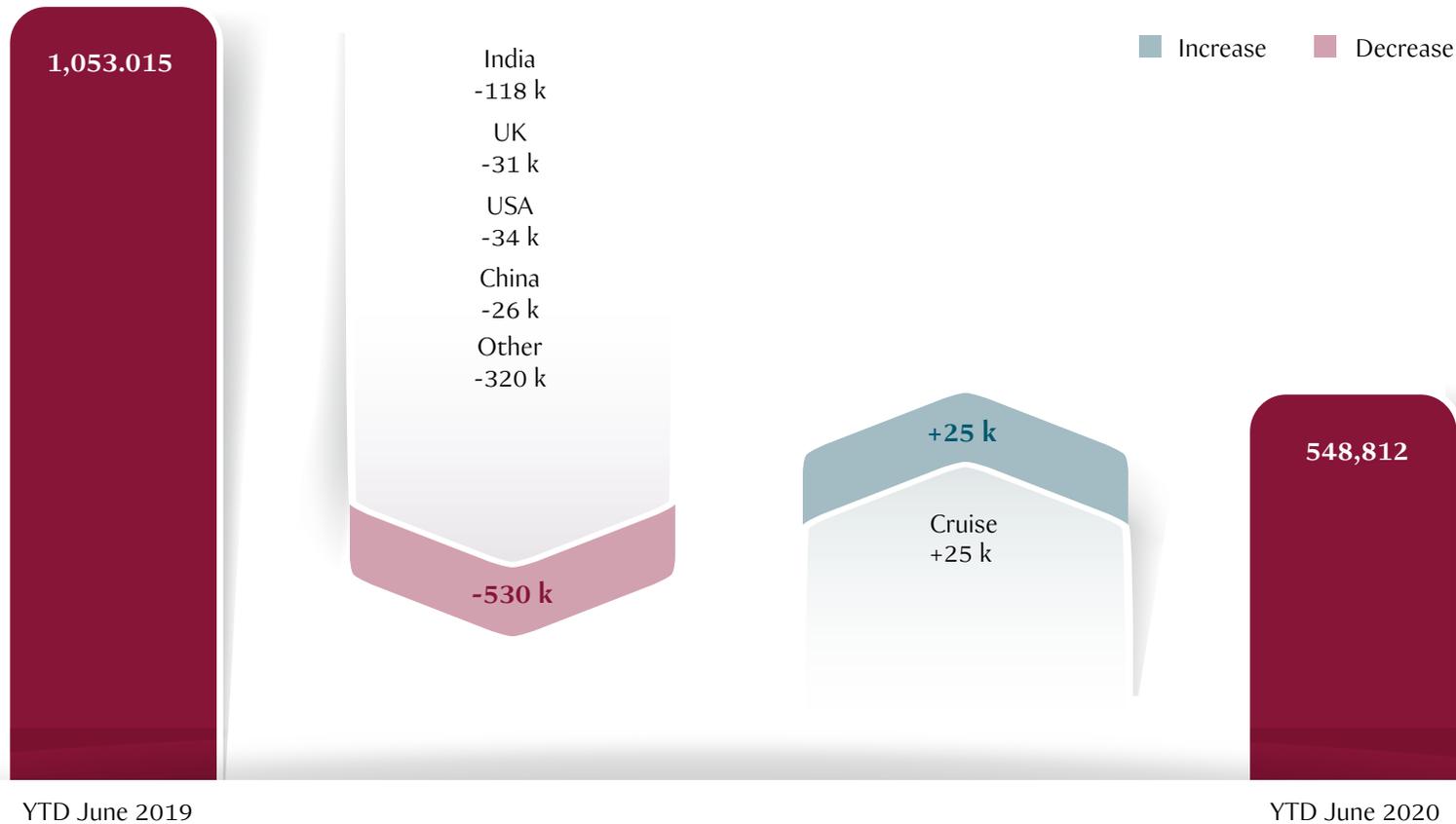
## Arrivals by month 2020 vs. 2019

“Visitor arrivals were again virtually non-existent in June 2020 due to continued border closures in response to the global COVID-19 pandemic. Year-to-date visitor arrivals are now down 48% compared to YTD June 2019.”

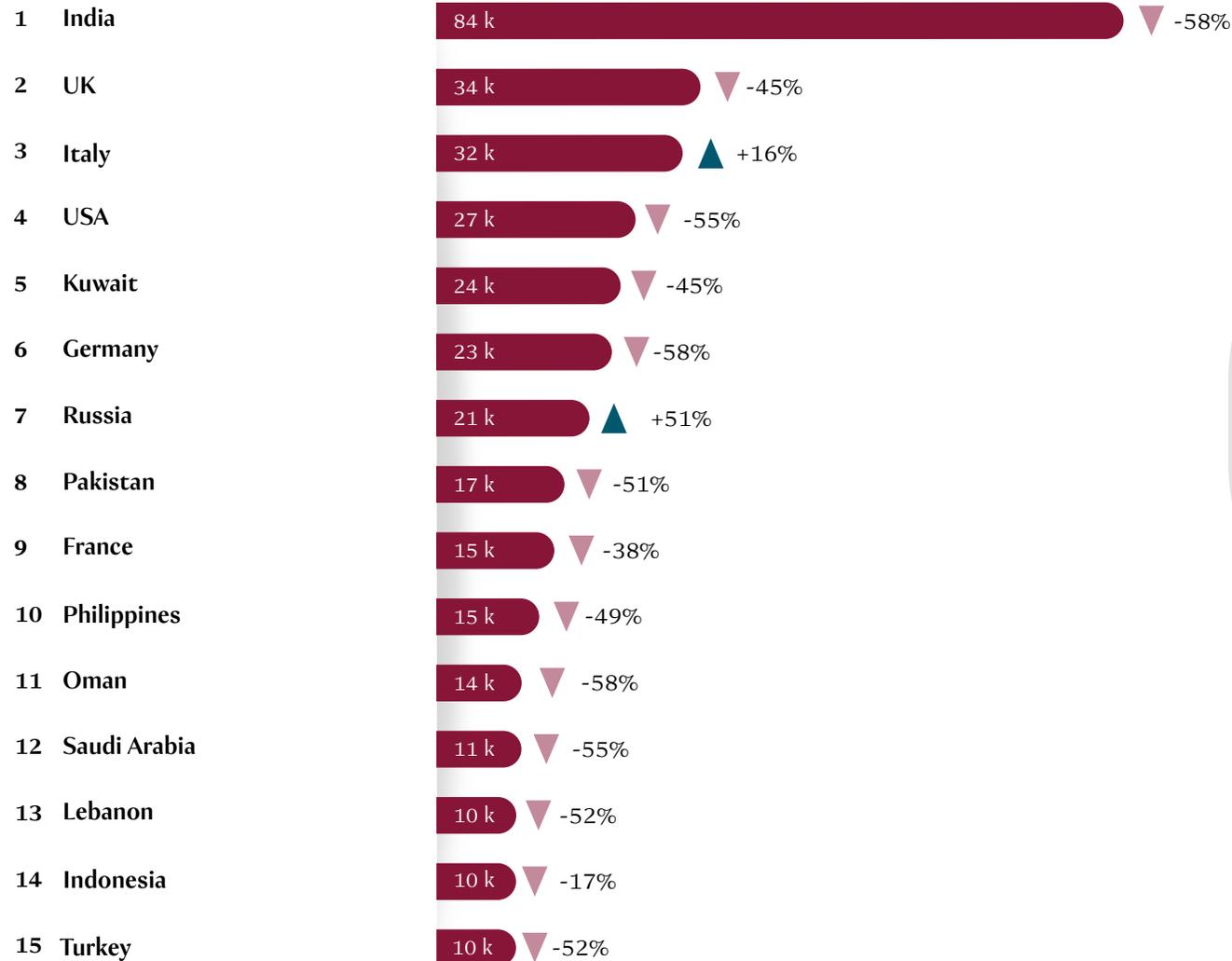


## Visitor arrivals sources of change YTD June 2020

“ Border closures due to the pandemic have resulted in visitation declines across all markets. Only cruise passengers are still showing higher visitation rates than in 2019 at the end of June 2020. ”



## Top 15 nationalities YTD June 2020\* vs. YTD June 2019

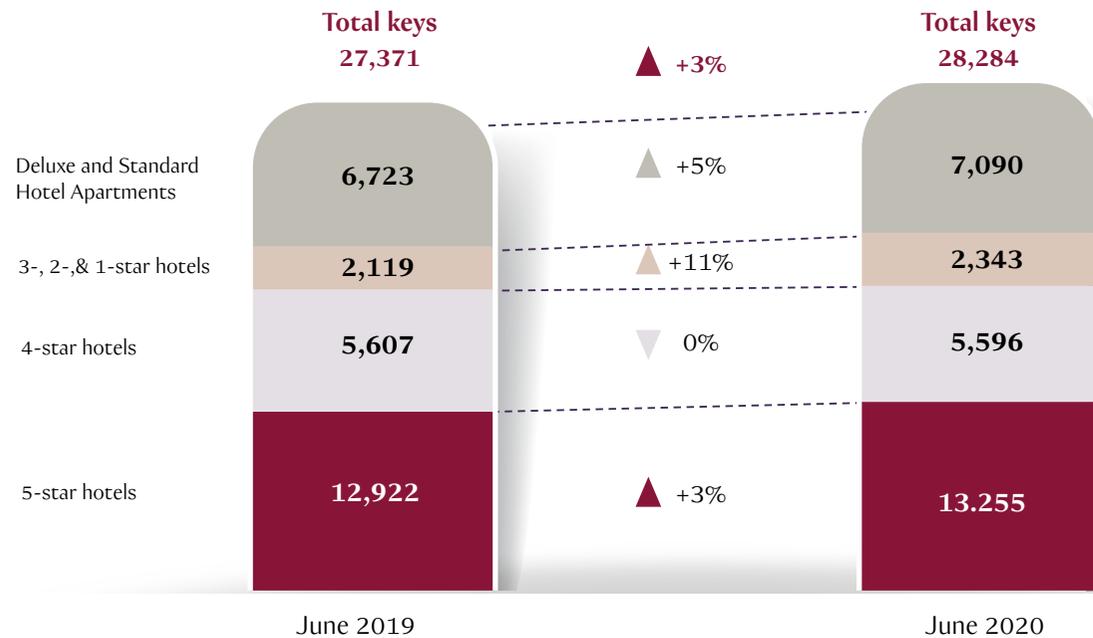


“With the exception of Italy and Russia, which had record numbers of cruise passengers before March of this year, visitor arrivals from all of Qatar’s top 15 nationalities have declined in comparison to 2019.”

\*Other nationalities YTD 2020: 202 k | Source: Ministry of Interior

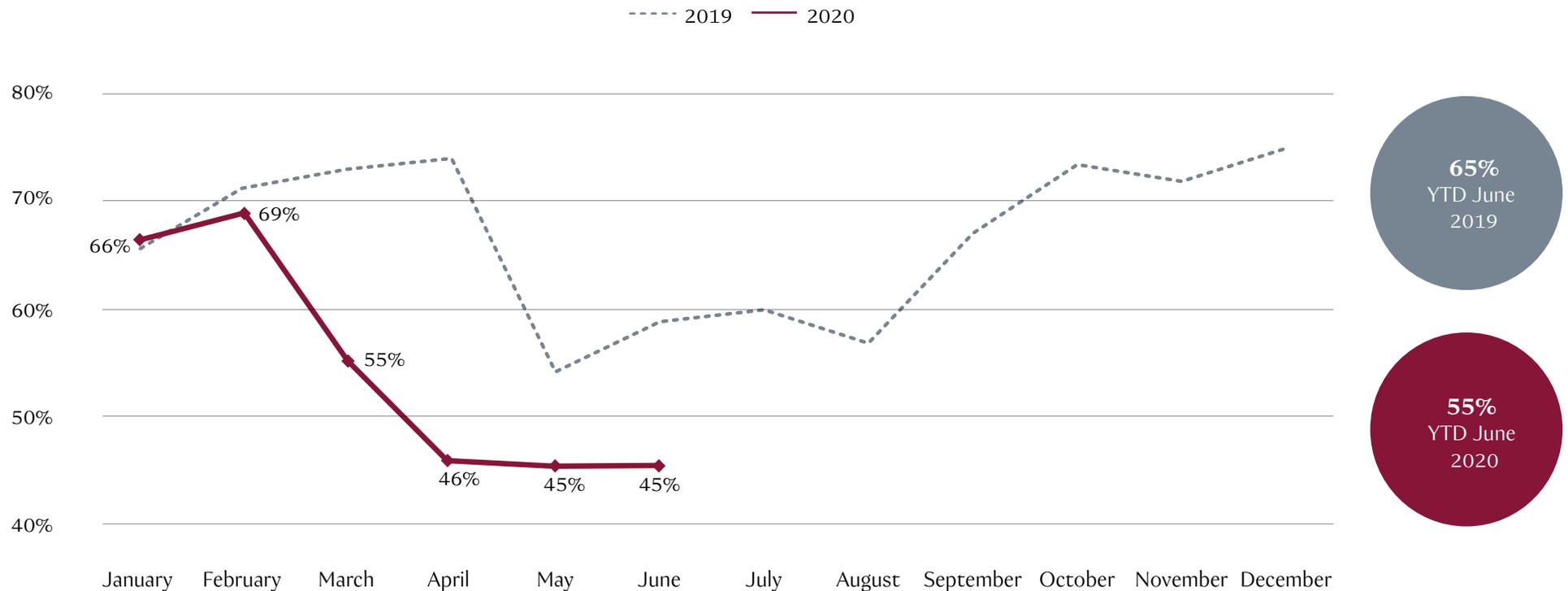
## Existing supply (Keys) June 2020 vs. June 2019

“The supply of room keys across Qatar’s hospitality sector has increased by 3% compared to the end of June 2019.”



## Full market\* occupancy rate 2020 vs. 2019

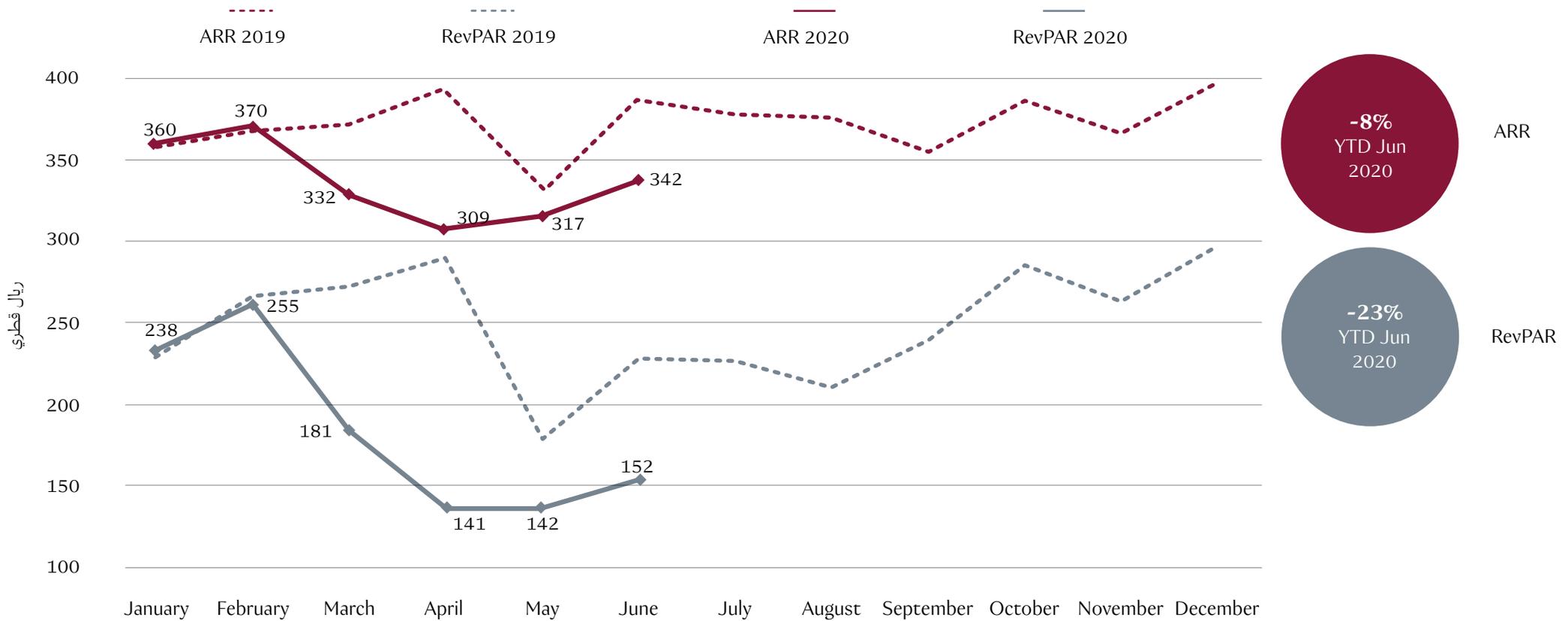
“ Throughout Q2 2020, occupancy remained stable at about 45% each month. Average occupancy YTD June 2020 is 55%, representing a 16% decline in comparison to YTD June 2019. ”



\*NOTE: Properties that have been leased or donated as quarantine/Covid-19 response facilities have been removed from the full market data set for the months of March through June.

# Full market\* ARR and RevPAR 2020 vs. 2019

“Despite occupancy remaining stable across Q2, ARR and RevPAR began to pick up slightly. However, ARR (-8%) and RevPAR (-23%) are still down year-to-date June 2020 in comparison to the end of June 2019.”



\*NOTE: Properties that have been leased or donated as quarantine/Covid - 19 response facilities have been removed from the full market data set for the months of March through June.

## Accommodation units (status as of 30 June 2020)

	Hotels		Hotel Apartments		Total	
	Keys	Rooms	Keys	Rooms	Keys	Rooms
5-Star	13,255	14,771	1,889	3,192	15,144	17,963
4-Star	5,596	6,583	4,644	5,295	10,240	11,878
3-Star	2,061	2,110	308	394	2,369	2,504
2-Star	266	266	88	88	354	354
1-Star	16	16	161	185	177	201
<b>Total</b>	<b>21,194</b>	<b>23,746</b>	<b>7,090</b>	<b>9,154</b>	<b>28,284</b>	<b>32,900</b>

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